

TECHNICAL/FUNCTIONAL REQUIREMENTS VERIFICATION

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
Task 1 - 4.1.1 All Software Functional Requirements	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen
1. All software proposed shall be capable of accurately preparing and filing any individual federal, state and local income tax returns for all possible tax situations prescribed by the IRS that may occur among those served by the VITA and TCE programs. At these sites, volunteers either prepare tax returns for taxpayers, or assist taxpayers with self-preparation. Not all volunteer sites have internet access. The contractor must provide a method for the software to function as a Web-Based Version, Self-Preparer Web-Based Version, and a Desktop Version. (See Glossary)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
1a. The software is capable of electronic return preparation for the following 1040 Series Family Forms - 1040, 1040A, 1040EZ, 1040NR, 1040NREZ, 1040PR and 1040X.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
4.1.2 Functionality Requirements for All Software	Does Not Meet	Meets Desk	Meets Professional Web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
2. Method for the software to function as a web-based application for assisted tax preparation.	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>		
3. Capability of the Desktop Version to install software and prepare tax returns on computers without an internet connection.	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
4. Method to enable site managers to track the status of prepared returns as it passes through IRS-defined stages: Preparing, Reviewing & e-File/Transmitting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
5. Method to ensure that only one preparer can edit a return at any given time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
6. Functionality which allows for capturing generic preparer-user data fields to capture information not found on the return, such as client demographic information or other user defined fields.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
7. Method for real-time diagnostic for form checks (aka schema validation) and tax law validation on tax returns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
8. Functionality of the Versions to support the indirect transmission of e-filed federal, applicable state, and local tax returns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
9. Method to securely download a taxpayer data file on fixed and removable storage media and to import the data file back into the software.	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
10. Method for a user at one location to be able to securely upload taxpayer documents to a different user at another location.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
11. Method to ensure that only authorized users can use the software within distinct permission levels in order to restrict certain users from performing functions described in Attachment 1.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
12. Method to allow transmission for multiple EFINs by a single site.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
13. Quality control features which require review of a completed tax return and, the ability to print a return, prior to submission.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
14. Method to ensure authorized users can determine who is working on a return during each stage of the filing process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
15. Method for the administrator or designee to restrict a user to one Data entry (i.e. prepare vs. transmitter) mode.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
16. Method for which EFIN/SIDN of authorized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
licensees is associated with every return.						
17. Process for which the Contractor can authenticate the EFIN of every transmission to the authorized licensee of the software	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
18. Notification process and the timeframe to acknowledge receipt, acceptance, and rejection of a return by the IRS.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
19. Functionality to provide timely notifications for acknowledgements, receipt, acceptance, and rejection of a return by the IRS.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
20. Method to require volunteers to update passwords upon first login.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
21. Method to allow a return that is started on a software package at a site to be completed by another volunteer using a software package at the same site.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
22. Method to print individual forms and/or a customizable package of forms for all printer types.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
4.1.2.1 Requirements for Self-Preparation Version:	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
23. Functionality of the Self Preparer Version to return errors and acknowledgements to the taxpayer via electronic notification.	<input type="checkbox"/>	N/A	N/A	<input type="checkbox"/>		
4.1.3 Preparation Capabilities	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
24. Software shall have no limit as to the number of local, state, and federal tax returns that can be filed per licensed copy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
25. Method for securely storing data from the previous tax year returns and supporting the secure transfer of taxpayer information into the current tax return.	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
26. Ability to meet IRS assurance testing system standards for filing electronic returns as well as the ability to prepare non-e-file returns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
27. Data entry modes for different experience levels of tax preparation to assist with gathering information necessary to prepare a return.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
28. Method for switching between form-based and interview-based data entry modes in real-time, without losing any information already entered.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
29. Ability for the software to support state income tax return preparation capabilities for all states with an income tax filing requirement by the 1st day of the filing season.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
30. Ability to support multiple states, local, and municipal return preparation capabilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
31. Ability to support independent federal and state return preparation capabilities. (e.g. either return may be prepared without preparing the other.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
32. Supported refund and payment methods including Electronic Funds transfer (EFT) (i.e. direct deposit, direct debit), paper check, split refunds and savings bond refunds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
33. Capability to disable any feature that offers the taxpayers a debit card.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
34. State return preparation capabilities for full and part year residents and non-residents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
35. Method of auto-populating information between state and federal returns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
36. Method for users accessing self-service help features to understand how to navigate and complete a tax return and resolve errors. The help features must provide context sensitive help, including	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
form-specific and field-specific help instructions.						
37. Ability to prepare Federal, state and local individual tax returns for the previous three tax years.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
38. Ability to e-file federal individual tax returns for the previous two years.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
39. Ability to prepare amended returns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
40. A method to carry forward permissible data to the next year's tax return within each software version.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
41. A method to support interview-based data entry capabilities for federal, state, and local returns. (See Glossary)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
42. Method to support form-based data entry capabilities for federal, state and local returns. (See Glossary)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
4.1.4 Software Distribution and Maintenance	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
43. Method for distributing software.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
44. Method of maintenance for software packages (including release notes for bug fixes, patches, notification regarding updates to users, and upgrades).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
45. Method for ordering, providing immediate acknowledgement of orders, tracking, and distributing software to the IRS and shipping to approximately 12,000 domestic and 70 international shipping addresses which could include multiple deployments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
46. Method that allows for unused licenses to be transferred from one user to a different	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
c. The software shall provide the ability for appropriately authorized users to create and run customized (also called “ad hoc”) management reports, based on a selection of data fields. This ability can be provided from within the software and must be accessible through a separate reporting web-site. The online reporting web-site for all IRS licensees shall run the same reports available from the desktop software.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
4.2.1 User Generated Reports	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
2. Standard statistical reports on demand, for all platforms required are as follows: a. Summary report on federal tax returns, categorized by various parameters including EFIN, return status and date of preparation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
b. Detailed report on federal tax returns prepared by EFIN and SIDN including Adjusted Gross Income (AGI) and general information for each tax payer and detailed information about each return prepared.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
c. Summary and Detailed reports on federal tax returns by tax form type with schedules – and should include all forms and schedules prepared.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
d. IRS e-Filing Acceptance and Rejects summary and detailed reports.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
e. Pending Acknowledgement summary and detailed reports – from either the IRS or states.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
f. Listing of all clients with summarized general information details for each client and categorized by EFIN and SIDN.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
g. Listing of all Employer Identification Numbers (EIN) used in each tax return (state or federal) and summary across all tax returns. That is, the EINs from the taxpayer's W-2, 1099.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
h. Reports cross-referencing details captured within the generic data fields per prepared tax return.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		N/A
i. Tax Preparer summary and detailed reports.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		N/A
j. Number of claims and total dollar amount for state claims of EIC, refunds, and balance due.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
k. Summary reports on counts of self-prepared and volunteer prepared.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
4.2.2 Recurring Contractor Generated Reporting	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
a. Weekly management reports during January through April	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
b. Monthly management reports May through October	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
c. Summary report containing the aggregate information in the SOW about the returns entered at each site and at all sites in accordance with the delivery schedule specified in the table of deliverables.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
4.2.3 - Ad Hoc Contractor Generated Reporting	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
1. The reports may contain the following information by the preparing EFIN: a. The total number of accepted federal and state returns filed electronically identified as transmitted, accepted and rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
b. The total number of accepted returns by filing status, i.e. married filing jointly, single, etc. and by type of form (1040, 1040A, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
c. Software package used, the SIDN, State EITC, State balance dues, State refund, the total number of accepted returns electronically filed claiming the earned income tax credit, child tax credit, education credit, and credit for the elderly, and the total amount of credits claimed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
d. Each EFINs beginning and ending transmission date.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
e. Total number of accepted returns electronically filed requesting direct deposit of refunds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
f. Average AGI of returns electronically filed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
g. The total number of federal returns that have zero or one dollar AGI.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
h. Number of accepted returns electronically filed where the primary or secondary filers were age 60 or over.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
i. The total number of accepted returns electronically filed claiming a refund and the total amount of refunds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
j. The total number of zero balance returns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
k. Total number of self-prepared and preparer prepared returns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
l. The total number of accepted returns electronically filed claiming a balance due and the total amount of the	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
balance due.						
m. The total number of returns filed that used an ITIN.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
Task 3 – 4.3 Customer Support Services for the IRS COR or Designee	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
1. The Contractor shall provide a full time point of contact (POC) to partner with the IRS Contracting Officer Representative (COR) or their designee, to be available to discuss and address issues that may arise and addresses each item of this task.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
2. The Contractor POC shall respond to reasonable requests for customization of features within the software. Examples of such requests include blocking bank products, linking to IRS training websites or customizing default values within the software (in order to reduce volunteer burden).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
3. The Contractor shall allow the IRS the right to include screen-shots and Contractor product information material in written materials and collateral, that will be used in support of the Tax Assistance Programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
4. The Contractor shall partner with the IRS POC to verify accuracy of software screen-shots or product information included in IRS publications. The Contractor may be asked to provide screen shots to the IRS POC via email if the information is not readily available via the software.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A
Task 4 - 4.4 Help Desk Assistance and Technical Problem Resolution Support	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
1. The Contractor shall provide a support website, toll-free telephone number, email and chat help desk support to licensee sites.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
2. The help desk will provide timely issued resolution to the licensee sites and detailed reporting to the IRS.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
3. Provide support for trouble-shooting technical issues related to the installation and operation of the software (hardware, printers, etc.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
4. Provided below are the minimum help desk requirements:						
a. Delivery of software through April, help desk support shall be available as follows: Mon - Fri: 8 AM ET - 12 AM ET and Sat and Sun: 8 AM ET - 8 PM ET.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
b. Post filing season, normal help desk hours are required Mon-Fri: 8 AM ET – 5 PM ET	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
5. In the case of a problem the expectation is that the provider will have someone working on it until it is resolved or a work around is established.						
a. The POCs for support issues shall provide contact information including a phone number, an email address, and contact information for after hours as necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
b. The help desk support shall permit unlimited contact from POC and IRS licensees by phone, email, chat, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
c. The help desk will provide a first contact resolution rate of at least 95% regardless of the method of reporting the problem.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
d. If resolution cannot be achieved during the initial contact, the Contractor shall provide a response within one hour with a status update. In no more than 4 hours the help desk shall present a plan for resolution. Problem resolution should occur within 24 hours.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
e. All calls shall receive first level help desk support with an on-hold time less than five minutes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
f. During the filing season, all help desk contacts shall be logged and accounted for in detail. The contact log shall contain: <ul style="list-style-type: none"> • The type of IRS program, i.e. VITA, TCE, etc. • licensee's EFIN • the problem identified • the solution that was provided to the licensee • date of contact, time of day • date of solution • length of time to answer in minutes • length of call in minutes, if applicable • number of incoming contacts • number of abandoned contacts • if contacts are categorized, the Contractor will provide a legend that defines the categories • Software type (web-based, desktop, or self-preparer version). 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
6. The Contractor shall provide, administer, and maintain a support web site for licensee access including IRS licensees. <ul style="list-style-type: none"> • The support web site shall be available to IRS licensees twenty-four hours a day, seven days a week. • All content on the support website (including FAQs, Blogs, etc.) shall be text searchable. • The Contractor's support web site shall provide product information, frequently asked questions and answers (FAQ's), links to email support 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
and software updates.						
7. The Contractor shall describe their method to mass-communicate with licensee's regarding outages, planned /unplanned maintenance, and other relevant issues twenty-four hours a day, seven days a week. (i.e. email, website availability, etc.). In the event of an unscheduled outage, the Contractor will provide initial notification to the COR no later than (15) minutes after initial discovery, hourly updates, and a resolution of the problem via broadcast email to all licensee POCs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Task 5 - 4.5 Training Requirements and Materials	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
1. The Contractor shall describe a method of delivery in which to provide training that is effective, efficient and feasible to ensure that up to 96,000 volunteers and employees are trained to use the software.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2. The Contractor shall describe their methods to deliver online and face to face training.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
3. Required training methods include use of online training modules including videos, face to face, webinars, recordings of webinars, a practice environment to enter mock return information and Contractor facilitated training forums.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
4. During contract performance, the contractor will provide a Beta version of all software and documentation, prior to it becoming commercially available, and no later than October 1st of each year. This software will be made available to the IRS Workstations Standards Idea Lab for testing and the IRS Point of Contact (POC).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
5. Functionality of the Web-based Professional Version and Desktop Professional Version is such that they would require the same training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
to use both of them. a. The contractor will provide a proposed training plan with their proposal. The training plan will be subject to modification based on feedback from the IRS POC once the contract has been awarded.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A		
b. The contractor’s proposed training plan will specify the following training details: <ul style="list-style-type: none"> • trouble-shooting scenarios • a training pilot session • length of training • training schedule (see deliverable table) • course objectives • course content outline with each section or topic indicating user roles and user segments targeted • course material to include exercises and examples, for each user role and user segment • measurement method/tool to indicate successful completion of specific exercises or test • a plan for IRS licensee training over the life of the contract. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
c. The web-based training software must provide a three second or shorter response time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
d. The Contractor shall describe a registration process for student enrollment in training sessions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
e. The Contractor shall describe a method to capture participants no later than 5 days after attending each training session.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
f. The Contractor shall describe a method to customize the training, curriculum and materials for IRS requirements based on user responsibilities. (See	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
Attachment 1)						
g. The Contractor shall describe a method for training IRS volunteers without access to the internet.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
h. The Contractor shall describe a method to access reference materials within the software.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
i. The contractor shall provide a printed user guide to accompany each software package delivered. The contractor shall also make the user guide accessible online to all users.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
j. Training materials shall cover accurately preparing federal tax returns, transmitting the returns, generating reports, picking up acknowledgement/ rejected files, and correcting rejected returns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
k. The Contractor shall make printed and electronic training materials available in English and Spanish.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
l. The Contractor shall describe their method of providing training materials in all software versions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
m. The Contractor shall provide online training for multiple users per site to practice creating, modifying, and printing sample returns with solutions to practice problems.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
n. The Contractor shall provide an online training environment that replicates the Professional Desk/Web version of federal returns and requires users to create a unique account. The Contractor shall provide training materials for IRS use.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
Task 6 - 4.6 Transition–in and Phase Out Requirements	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
1. The Contractor shall describe their method of transition as to not disrupt the tax season and provide the schedule of events.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2. Tasks required to successfully transition the work within a (180) day period include Contractor involvement in the following readiness activities necessary to assume the existing work: <ul style="list-style-type: none"> customization of reporting capabilities software customizations, if applicable testing help desk stand up training volunteers to use the software 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Task 7 – 4.7 Regulatory, Security and Privacy Standards	Does Not Meet	Meets Desk	Meets professional web	Meets Self-Prepared Web	PWS Section and Page Number	Software Screen (See Sub-factor A)
1. Award of this contract will be contingent upon the contractor’s facility, systems, and procedures, successfully passing the IRS Contractor Review, performed within 2-weeks after notice of intent to award.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2. Subsequent to the Contractor Review, the contractor will submit a plan of compliance to mitigate the risks within 2-weeks from IRS notification of vulnerabilities or risks disclosed during the review.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
3. Once IRS approves the plan the contractor will be fully compliant with the recommendations within 60 days.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
4. IRS will perform a follow-up safeguard review within 2-weeks after the 60 day deadline to validate contractor compliance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
5. Because of heightened security awareness, the IRS may, from time to time, notify the	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

TECHNICAL /FUNCTIONAL REQUIREMENTS VERIFICATION THE CONTRACTOR MUST DESCRIBE [HOW/THEIR]		Provide Reference to (PWS) Performance Work Statement				Software Screen (See Sub-factor A)
contractor of increased risks, and request changed security procedures.						
6. The contractor will negotiate with the IRS to determine the timing, scope, and resolution of the problems.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		